Exclude Position from Budget

NOTE: Prior to excluding a position from the budget, ensure to vacate the position (Please refer to Job Aid # 8). Once the position has been vacated, the user must update the salary grade value and FTE value to 0 (Please refer to Job Aid # 5 & 6). Once the position has been vacated and the position values reflect 0 follow the following steps to exclude the position from the budget.

1. From “My Task List” click and open “Position Budget Preparation”.
2. Click and open “Manage Position and Employee Data”.
3. Click “Maintain Position Data”.
4. In the upper left hand dropdown box of the “Task List Status” window click the down arrow to search for the department. You can search by either the department title or department ID.

5. Click on the department title and then click the symbol to fetch the data. Please note that in Hyperion the department IDs begin with a “D”.
6. Once the data has been loaded Right click the position that needs to be excluded in the “Task List Status” window.

7. Click “Exclude Position from Budget”.
8. “Launch Confirmation Message” window will pop up asking if user would like to exclude position from Budget.
a. Click on “Ok”.

9. Specify the dates between which to omit position expenses, and then click “Exclude”.

10. Attempting to exclude a Position from the Budget that is not vacant will prompt the following error.

![Error Message]

11. A pop up window will confirm if the Exclude Position from Budget was successful. Click on “Ok”.

12. Once the action is complete, be sure to hit the “Save” icon on the top tool bar.